



SINER-GI project

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Case Study presentations

The Roquefort cheese supply chain

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Case presentation

- Roquefort (blue cheese)
- 18 586 tons (2005)
- 19 869 tons in 1991 ;
18 135 tons in 2000.
- 7 processors,
2 330 milk producers (2005)
- Old world market
(3 000 tons exported in 2005)
- Upmarket product (high price,
reference for consumers)
- 85 % of Roquefort sold
in supermarket



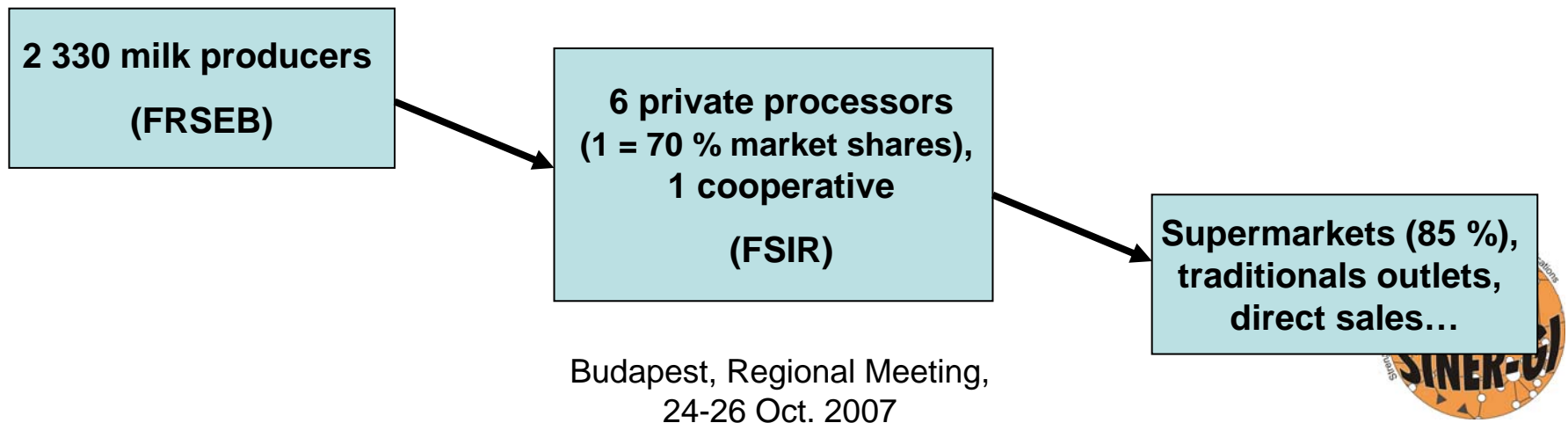
Protection schemes

- **An old protection** (judgement from the Toulouse Parliament : 1666).
- **AOC obtained with the law of July 26th, 1925** (now regulated by the decree of January, 22nd, 2001).
- **PDO obtained in 1996** with the Reg. (CE) n°1107/96.
- **Product managed by the *Confederation of Roquefort***, created in 1930.
- **Specific code of practice** (ewe's raw milk, "Lacaune" breed, feeding based on grazingland and fodder coming at least for 75 % from the area of production, 90 day of ripening,
- **A complex system of controls linked with INAO** (National Institute of Designation of Origin) : auto-controls, internal and external controls done by a third body (current reform)
 - *Fédération Régionale des Syndicats d'Eleveurs de Brebis* (FRSEB, 1922) : management of milk production in the region,
 - *Fédération des Syndicats des Industriels de Roquefort* (FSIR, 1928) : defense of processor's interests,
 - *Confederation of Roquefort* (FRSEB + FSIR) : management of the PDO, prices negotiations.

Motivations and stakeholders

- A product threatened by numerous imitations and frauds (use of cow milk, production of cheeses called "Roquefort" out of the region)
- A compromise between milk producers (*area of production*) and processors (*monopoly on the denomination*)
- A legal protection intended to « stabilise » the market and reduce conflicts between actors (price of milk)

Schema of the GI system



Impacts of the GI system / protection scheme on sustainability / economic effects

- **A complex system of rules established by actors** intended to negotiate the milk price every year (quality and market)
- **A specific price dedicated to Roquefort with a high valuation**
(about 1 € per litre)
- **An average price between 14 and 16 € per kilo**
(Bleu des Causses - 10 € ; Bleu d'Auvergne - 7,5 €)
High quality, strong reputation and notoriety, high costs of production (ewe's milk)
- **A specific situation : a well-known trademark – Société – associated with the AOC label.**
Société = 47 % market shares ; distributor's brand name = 23 % (2005)
- **A commercial succes leading to an increasing competition (imitation ?)**
The *Saint-Agur* trademark (Bongrain group, cow milk, 4 000 tons, equivalent prices)
- **A stabilised market, narrow but guaranteed**
18 135 tons in 2000 ; 18 586 in 2005 (+ 2,5 %)



Impacts of the GI system / protection scheme on sustainability / social effects

- **An important economic weight : 2 330 milk producers and 1 700 industrial jobs**
(45 % of total jobs and 50 % of added value of South Aveyron)
- **About 10 000 jobs for all the activities linked with the supply chain**
(8 % of agroindustrial jobs of Midi-Pyrénées Region)...
- **...in a territory characterised by an important demographic decline**
(18 inhab. per km² for South Aveyron)
- **A specific productive system dedicated to milk/cheese production, contributing to a « pole » of resources and skills based on agricultural and agrofood activities**
(logistics, relations with local costumers, quality management, research & development...)
- **Some links with tourism...**
(200 000 visitors per year for the Roquefort caves)...
- **...But a weakness in terms of local networks**
(no initiatives as Road of Cheeses like in Savoies or Auvergne for example)
- **A situation essentially due to the very valuable income generated by the acti**
(no alternative development project)



Impacts of the GI system / protection scheme on sustainability / environmental effects

- **A productive system based on intensification...**
(genetic selection of "Lacaune" breed, increase of the size of herds...)
- **... With environmental impacts in debate** (biodiversity)
- **But an important activity which positive effects on landscape preservation in a fragile region**
(specific "grands causses" landscapes with "lavognes")



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Comparison with other cases - initiatives

- **An example of economic and commercial success...**
 - high price of milk,
 - high valuation of cheese,
 - preservation of farmers : 1997-2004 = – 10 % (France = – 32 %)
- **... But with important sacrifices**
(strong restructuring in farms and dairies, rural exodus...)
- **A territory strongly dependant on the supply chain perennality and without other choice of way of development**
(in spite of recent initiatives : « *Pays de Roquefort* », « *Centre de Ressources du Pays de Roquefort* »)
- **Conclusion : a productive system apparently strong in a fragile territory**

Trends and perspectives: GI system

(value chain structure/technology/market)

- **Driving forces** : sectoral governance (private firms) with territorial preoccupations (elected representatives, agricultural trade unionism...)
- **Pressures** : competition, increasing price of milk, CAP
- **State** : small decrease of market shares, uncertainty
- **Response** : market innovations (« *Bleu de brebis* » from Lactalis, development of « *Salakis* » brand for Feta), permanent research of valuation

Trends and perspectives: GI protection schemes (*organization and political strategies*)

- **Driving forces** : INAO reform (controls, organisation), revision of code of practice
- **Pressures** : adaptation of the Confederation of Roquefort with new regulations (internal and external controls)
- **State** : organisational uncertainties
- **Response** : negotiations between actors, evolution of statutes, identification of milk producers as partners in full measure of the supply chain